



Industry Day

**MENTOR
PROTÉGÉ PRESENTATION**



Mentor Protégé Program

- ✓ The Mentor Protégé Program is designed to encourage approved mentors to provide various forms of assistance to eligible Participants. This assistance may include technical and /or management assistance: financial assistance in the form of equity investments and /or loans: subcontracts and/or assistance in performing prime contracts with the Government in the form of Joint Venture Agreements.



MENTOR

- ✓ **DEMONSTRATES COMMITMENT AND ABILITY TO ASSIST DEVELOPING 8(A) PARTICIPANTS**
 - **8(A) GRADUATE**
 - **FIRM IN TRANSITIONAL STAGE**
 - **OTHER SMALL BUSINESSES**
 - **LARGE BUSINESSES**



QUALIFICATIONS

- ✓ POSSESS FAVORABLE FINANCIAL HEALTH
- ✓ PROFITABILITY FOR TWO YEARS
- ✓ GOOD CHARACTER
- ✓ NOT DEBARRED OR SUSPENDED
- ✓ IMPART VALUE TO PROTÉGÉ FIRM VIS A VIS 8(A) EXPERIENCE OR
- ✓ GENERAL KNOWLEDGE OF GOVERNMENT CONTRACTING



GENERAL RESTRICTION

- ✓ ONE MENTOR FOR ONE PROTÉGÉ
- ✓ ONE PROTÉGÉ FOR EACH MENTOR

EXCEPTION

- AA//8(A) BD may authorize a concern to mentor more than one protégé at a time.**
- ✓ **Additional relationship will not adversely affect the development of either protégé firm**
 - ✓ **Second firm cannot be a competitor of the first firm.**



QUALIFICATIONS OF PROTEGE

- ✓ **DEVELOPMENT STAGE OF PARTICIPATION**
- ✓ **VIRGIN 8(A) CONTRACTOR/OR**
- ✓ **HAVE SIZE < 1/2 OF SIZE STANDARD IN
PRIMARY SIC CODE**
- ✓ **GOOD STANDING**

BENEFITS

- ✓ **JOINT VENTURE AS A SMALL BUSINESS FOR ANY GOVERNMENT PROCUREMENT**
- ✓ **MENTOR MAY OWN \leq 40% Equity interest**
- ✓ **PROTÉGÉ FIRM MAY QUALIFY FOR OTHER ASSISTANCE AS A SMALL BUSINESS, INCLUDING SBA FINANCIAL ASSISTANCE**

BENEFITS

- ✓ NO DETERMINATION OF AFFILIATION OR CONTROL BASED ON AGREEMENT OR ASSISTANCE PROVIDED
- ✓ MENTOR AS LARGE BUSINESS - ADA/GC/8(a) MUST APPROVE IN ADVANCE ANY OFFER SUBMITTED BY THE MENTOR AND PROTÉGÉ AS A JOINT VENTURE ENTITLED TO TREATMENT AS A SMALL BUSINESS, SDB, OR 8(A) CONCERN.



CONSIDERATIONS

- ✓ **BENEFITS TO PROTÉGÉ**
- ✓ **POTENTIAL HARM TO ANY INCUMBENT SMALL BUSINESS**
- ✓ **ADVANTAGES OBTAINED IN THE OFFERING CONDITIONS OR PRICE ~ INVOLVEMENT OF LARGE BUSINESS**
- ✓ **PREVIOUS APPROVAL**
- ✓ **IMPACT ON ANY OTHER GOVERNMENT CONTRACTING**



ADDITIONAL FEATURES

- ✓ **WRITTEN AGREEMENT**
- ✓ **APPROVED BY AA/8(A) BD**
- ✓ **REAL DEVELOPMENT OF THE PROTÉGÉ**
- ✓ **AGREEMENT IS NOT A SHAM**



EVALUATION

- ✓ **ANNUAL BUSINESS PLAN UPDATE**
- ✓ **TECHNICAL /MANAGEMENT ASSISTANCE PROVIDED**
- ✓ **LOANS OR EQUITY INVESTMENTS**
- ✓ **SUBCONTRACTS**
- ✓ **FEDERAL CONTRACTS AWARDED TO THE
RELATIONSHIP**
- ✓ **NARRATIVE**
- ✓ **ANNUAL**